

Procurement News

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**Stony Brook University
Procurement Office**

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Cell Phone/Wireless Device Procedure

In accordance with the new cell phone policy posted on our Procurement Website, we can no longer reimburse telephone charges on personal phones when used for business purposes. If you have a Verizon Wireless phone or wireless device, we have posted the Verizon Wireless form and instructions for transferring liability from a personal phone to a Stony Brook University phone (Research Foundation or Stony Brook Foundation).

We are in the process of acquiring the forms for Cingular and Nextel/Sprint and will post them to the website as well.

If you have any questions, please contact Laura Beck @ 2-6229 or Deborah Marcus @ 2-6286.

Property Control

Property Control has begun issuing Asset Decals when equipment is purchased rather than after it is received. Central Receiving will affix the decal onto the equipment. Please call Anna Artale-Bruno @ 2-6306 with any questions.

Enterprise Rent-a-Car

Enterprise has recently opened a satellite office at Stony Brook University. Hours of operation are Monday to Friday from 8:00 a.m. to 5:00 p.m.; their office is located in the basement of the Melville Library Bldg, Rm. E0304.

Enterprise Rent-A-Car is the New York State contracted service provider for car rentals for all regions in New York State and the United States.

The NYS Office of General Services recommends that travelers purchase the damage waiver protection (sometimes referred to as CDW or LDW insurance from Enterprise). If you do not

purchase CDW/LDW, the renter (agency) is responsible for damages to the rental vehicle and should notify their agency immediately to file a claim.

When booking with Enterprise, **the Stony Brook corporate code JN0645 must be given** to receive contract rates. These rates can be booked by calling the individual branch at 632-1133, the toll free number at 1-800-736-8222 or by visiting www.enterprise.com and entering the Stony Brook PIN: **STO**.

Depending on the funding source, the traveler should rent in the name of the State or Research Foundation and sign as agent of the State or RF. This ensures that the traveler and State or Research Foundation are properly covered and eliminates any confusion regarding liability for coverage in the event of a claim.

For rentals within New York State, the traveler must submit proof of tax exempt status and a letter of authorization signed by the traveler's supervisor on agency letterhead advising that the traveler is renting for business purposes only. The dates of the rental should also be included.

Depending on the funding source, the renter must present the following:

State: AC-946 Tax Exemption Certificate. This form is available at: <http://www.osc.state.ny.us/agencies/ac946.pdf>.

Research Foundation: ST 119.1 Sales Tax Exemption Certificate available by calling the Procurement/Travel Office at 2-6022.

Insurance

According to the State and Research Foundation travel guidelines, only LDW (Loss Damage Waiver) or CDW (Collision Damage Waiver) is reimbursable when traveling on business.

Any other type of insurance including PAI (Personal Accident Insurance) will not be reimbursed when renting a car from either a contract or non-contract car rental agency.

Please note that the NYS Visa Procurement card and/or purchase order **can not** be use as a form of payment.

Car Service

An employee traveling on State funds who uses car service to travel to a transportation terminal - an airport or railroad station-is required to pay for his/her transportation costs. Upon completion of the trip, the traveler must submit proof of payment for the expense along with all other travel expenses on a State travel voucher (AC132).

Direct billing for car service from a vendor is to be used only for non-employees visiting the University for their transportation to and from their hotel and/or transportation terminal. The

department upon receipt of an invoice should submit the invoice attached to a State standard voucher (AC92) signed by an authorized signatory indicating the state account number and forward to the Procurement/Travel office.

Forms are available on the Procurement website at www.stonybrook.edu/procurement. Click on For Employees then Forms, select Travel.

If you need additional information, contact Rosalie Makarick by email at Rosalie.makarick@stonybrook.edu or call 2-6022.

2007 Mileage Rate

The IRS has announced a new rate for **personal car mileage. Effective January 1, 2007, the new rate is 48.5 cents per mile for business travel.** This standard rate for business miles is based on the costs of operating an automobile such as maintenance and repairs, tires, gasoline, oil, insurance, license and registration fees and depreciation or (leased payments).

2007 Per Diem Rates & Meal Allowance Schedule

On October 1, 2006 the new **2007 Per Diem Rates** for lodging and meals for domestic travel took effect. **Be advised that the borough of Queens is no longer included under the Manhattan rates. As of November 1, 2006, Queens is listed with their own per diem rates.** The new rates can be found on the following websites:

<http://www.gsa.gov/> Go to Travel Resources click on Per Diem Rates

<http://www.osc.state.ny.us/agencies/travel/meals.htm>

<http://www.stonybrook.edu/procurement/employees/>

Click Travel, and then scroll down to Per Diem Travel Rates. You must indicate the year in your inquiry.

These rate and meal changes apply to both State and Research Foundation travel.

Reimbursement of Relocation Expenses

Reimbursement of relocation is a reportable expense and is subject to Internal Revenue Service (IRS) tax guidelines.

State

SUNY recently revised their relocation policy. **State employees** may now be reimbursed for actual moving household goods, personal effects and travel expenses that exceed the previous

limit of \$3,000.00. The appointee should select a carrier that is registered with the Interstate Commerce Commission. If a private mover is used, three written estimates must be obtained; the lowest of which will be used for reimbursement.

Claim for reimbursement must be submitted within one year of the effective date of the appointment. If the employee terminates employment within one year of their appointment date, all funds must be repaid back to the appropriate funding source.

Relocation Expenses Eligible for Reimbursement

- Basic cost of moving household goods.
- Basic cost of rental of trailers or trucks.
- Cost of packing and/or unpacking of household goods or personal effects if such services are provided by the carrier.
- Cost of transportation of the appointee and his/her family to the new location at the current New York State rate for the use of personally owned vehicles, the mileage to be measured by the shortest highway route between two places of residence. Payment will be made for one vehicle only, or actual method of transportation used (e.g. airfare).
- Cost of additional insurance above the lowest valuation rate charged.

Relocation Expenses Ineligible for Reimbursement

- Transportation of automobiles, boats and other motor vehicles.
- Household goods and personal effects in excess of 12,000 pounds.
- Temporary housing and pre-move expenses.

Required Documents

- [Standard Voucher \(AC 92\)](#) indicating state account number.
- [Request for Reimbursement for Moving Expense Agreement \(AC 1099\)](#).
- [Relocation Expense Authorization \(SUSB 1401C\)](#).
- Original Bill of Lading, copy of Packing Slips and Proof of Payment.
- [Statement of Automobile Travel \(AC 160\)](#), if requesting the cost of moving one personal automobile at the IRS allowable rate of \$0.445 per mile effective 1/1/06.

Research Foundation

Research Foundation employees may be reimbursed up to \$3,000.00 for moving household goods and personal effects. Employees must attach the Research Foundation Relocation Expense Authorization and Payment Form and original receipts to a Research Foundation Purchase Requisition. The forms are available on the Procurement website.

For tax purposes, the IRS classifies moving expenses into two types:

Qualified (non-taxable)

- Reasonable costs for transportation and storage of household goods and personal effects.
- Travel and lodging payments for moving from previous residence to new residence.
- Use of personal car (receipted gas or \$0.18 per mile).

Non-Qualified (taxable)

- Moving expenses not previously listed such as meals and pre-move expenses.
- Call Rosalie Makarick at **632-6022** for additional information regarding relocation guidelines.
- [Moving Expense Reimbursement Request and Authorization Form - \(PROC0002\)](#)

NOTE: If a State or Research Foundation employee terminates employment within one year of their appointment date all funds must be repaid back to the appropriate funding source.

Required documents for reimbursement of relocation expenses may be downloaded from the Procurement website. Visit www.stonybrook.edu/procurement

Research Accounts Payable

STIPENDS

The status of the Participant must be clearly indicated on the form to prevent a delay in processing, i.e., U.S. Citizen, Resident Alien or Non-Resident Alien. Payments to Non-Resident Aliens are subject to immediate withholding at the rate of 30%. We have also received additional information from Human Resources and RF Central that states only J-1 or F-1 visa holders can be paid a participation or fellowship stipend. Please note that all Participants will receive a Form 1099 tax statements for U.S. Citizens and Resident Aliens from the Research Foundation indicating the amounts they were paid. All Non-Resident Aliens will receive a Form 1042S tax statement.

DEPARTMENT CONTACTS

Please indicate clearly on requisitions, the full name and telephone number of the person to be contacted for clarification on any items related to the requisition or Purchase Order. This will avoid any delays in payment.

INDEPENDENT CONTRACTOR FEES: All departments requesting fees to be paid to Non-Resident Aliens are responsible for seeing if they can apply for exemptions under current Tax Treaty Provisions. Once the payment has been made and the withholding deducted this process cannot be reversed. **Only payments to Non-Resident Alien Independent Contractors using RF Funds must be reviewed by Human Resources. All other RF Independent Contractor requests for US Citizens and Resident Aliens can be submitted through the usual channels.**

BLANKET ORDERS: We are requesting that Departments review and close all outstanding Blanket Orders that are more than a year old. This ensures that record keeping is more accurate, and helps expedite the close-out process of terming grants.